



Duty Statement

Request for Personnel Action (RPA) Number 2223-03239	Effective Date
Classification Title Tax Technician	Position Number 564-659-7505-002
Working Title Tax Technician	Bureau and Section Field & Complex Account Collection Bureau - Southern Region

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the general supervision of the Public Service Supervisor, the incumbent performs paraprofessional tasks of tax and nontax law, regulation and policy enforcement and other related work at the Franchise Tax Board. The incumbent will use the knowledge of all phases of debt collection and tax compliance to proactively perform all aspects of compliance work to resolve accounts and educate taxpayers to prevent future tax liabilities and non-compliance.

Essential Functions

Percentage	Description
50%	Utilizes collection skills and tools to efficiently and effectively resolve moderately complex or sensitive collection accounts. Ensures due process has been provided and all attempts to resolve cases voluntarily have been made prior to invoking involuntary collection actions. Analyzes and reviews cases and financial information to determine appropriate collection accounts. Contacts delinquent taxpayers via telephone, skip tracing, correspondence and third-party contacts to request payment in full, explain assessments and gain compliance to resolve collections cases. Provides education to taxpayers and businesses in order to gain future compliance. Responsible for maintaining and monitoring collection caseloads on a daily basis for follow-up and to ensure that commitments are met by taxpayers, businesses and/or their representatives and initiated appropriate collection action.
40%	Public Counter functions including communicating with personal and business tax taxpayers directly in person to advise and explain various provisions of laws and regulations administered by the Department. Resolves collection notice problems, handles liability disputes, initiates transactions to correct account errors and modify or release accounts, explains the basis for the liabilities, identify, analyze and release liens. Analyzes financial statements and recommend payment arrangement plans, issue assessments for missing years and recommend discharge from accountability. Provides Business Entity revivor requirements and process requests that meet requirements.

Marginal Functions

Percentage	Description
10%	Additional work-related duties may include cashiering, mail processing, answering telephones, organizing/ordering forms, training new employees and providing administrative support.

Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

Signature

Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)

Signature

Date